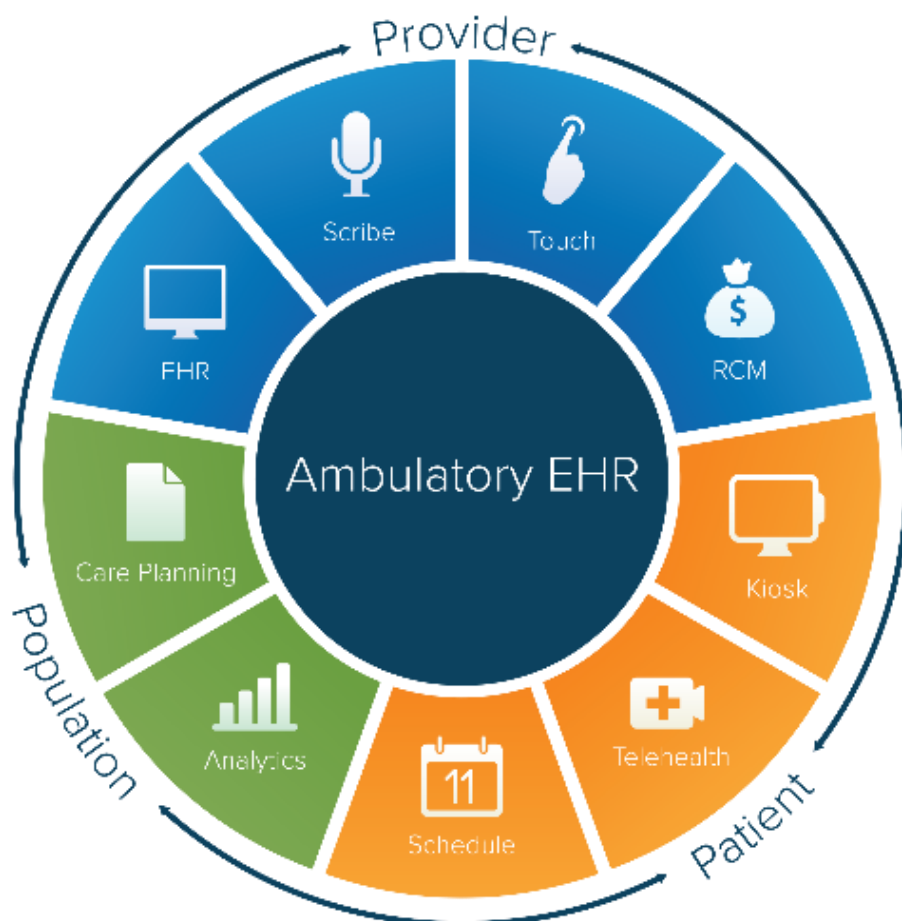


END USER WORKBOOK—EMR III

Kentucky Department for Public Health—March 2017



Documentation. Pursuant to this Agreement, Customer may receive copies of or access to certain written technical support or explanatory documents regarding eClinicalWorks's software; eClinicalWorks's services; and/or eClinicalWorks's internal policies and procedures (collectively, "Documentation"). Customer acknowledges and agrees that all such Documentation is and will remain the sole property of eClinicalWorks and that eClinicalWorks shall retain all intellectual property rights in all Documentation, including but not limited to patents, copyrights, or trademarks. Customer agrees that it will treat Documentation as highly confidential information and that Customer will not share Documentation with any third party, post any Documentation on the internet, or otherwise externally publish any Documentation. Customer may disclose Documentation to its employees or independent contractors for the purposes of utilizing eClinicalWorks's software or services, provided that Customer (i) obtains reasonable assurances prior to making any such disclosure that Documentation will not be used in violation of this Agreement and (ii) such disclosure will not result in Documentation becoming generally accessible to the public at large. Notwithstanding any other provision in this Agreement to the contrary, Customer agrees that it will never negligently, willfully, or knowingly allow any person or entity that competes with eClinicalWorks to access Documentation. Customer agrees to promptly inform eClinicalWorks in writing of any violation of this provision by Customer or one of Customer's employees or agents of which it becomes aware. Upon termination of this Agreement, Customer agrees to return all Documentation and all copies of Documentation to eClinicalWorks and, if such return is not feasible, to destroy all Documentation and all copies of Documentation. Customer agrees that its obligations under this provision will survive termination of this Agreement. Customer agrees to certify its compliance with this provision in writing.

CONTENTS

EMR III WORKFLOWS	4
Advance EMR Features	4
Progress Notes Templates	4
Using Progress Notes Templates	4
Merging Templates from the Right Chart Panel	5
Adding Favorite Templates	6
Order Sets	13
Using Order Sets from the Progress Notes	13
Accessing Order Sets from ICW	14
eClniSense	15
Quick Search	17
Patient Dashboard Options	18
Accessing the Patient's Demographic Information and Patient Hub	18
Printing and Faxing Medical Summary	18
Viewing Patient Encounters	19
Printing and Faxing Patient Encounters	19
Viewing Scanned Documents	20
Printing and Faxing Scanned Documents	20
Viewing Patient Flowsheets	21
Printing and Faxing Flowsheets	22
Interactive Clinical Wizard (ICW) Options	23
Accessing and Customizing the ICW	23
CDSS Measures	25
Alerts	26
Patient Specific Alerts	26
Suppressing Patient and Generic Alerts	27
Global Alerts	28
Generating and Printing Letters	29
Telephone Encounters	30
Creating New Telephone Encounters	30
Telephone Encounters Tab Overview	32
Looking Up Assigned Telephone Encounters	34
Actions Overview	35
Creating a New Action	35
Working with Assigned Actions	36

Documents	38
Scanning Documents & Working with Scanned Documents	38
Attaching a Scanned Document to the Patient's Chart	40
Receiving Lab and DI Results	43
Receiving Electronic Lab Results	46
Receiving Electronic Rx Refill Requests	48
Managing Electronic Refill (E Quick-Launch Button)	50
Electronic Faxing	51
Incoming Faxes	51
Assigning a Faxed Document to a Staff Member	51
Creating Telephone Encounters from Faxed Documents	52
Outgoing Faxes	53
Resending Failed Faxes from the Fax Outbox	54
Viewing Fax Logs in the Patient Hub	54
APPENDIX A: NOTICES	55
Trademarks	55
Copyright	55

EMR III WORKFLOWS

The following sections describe the end user EMR III workflows.

For more information about these workflows, and V10e, refer to the *eCW 101 EMR III Workbook* and the documentation available on the my.eclinicalworks.com Customer Portal.

Note: For information about patient safety, refer to the Patient Safety Advisory Letter, available on the my.eclinicalworks.com Customer Portal.

Advance EMR Features

Progress Notes Templates

Providers can create generic and patient-specific templates.

Using Progress Notes Templates

Path: *Progress Notes > Arrow next to Templates > Copy and Merge from Templates*

Copy or merge templates to the Progress Notes. Merging adds the template to the Progress Notes without overwriting any data that was in that section. Copying a template overwrites, and replaces a section of the Progress Notes with the template.

To copy, or merge a template:

1. Select the *Generic* or *Patient Specific* radio button.
2. In the *Find* field, enter the keyword of the template, and click *Go*.

The list of templates displays.

3. Check the box next to the template.

4. Check the box for the section name (*e.g.*, HPI, Current Medication, *etc.*):

Copy And Merge Templates

Template for Patient: **Williams, Abigail** Encounter Date: **04-08-2016**

Choose Template

☒ Generic ☐ Patient Specific

Find:

Facility:

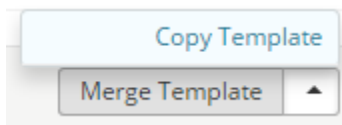
TEMPLATE	ACCESS	PREVIEW
<input checked="" type="checkbox"/> -Medicare AWV, Female - Initial	Public	<input type="button" value="☆"/> <input type="button" value="Preview"/>
<input type="checkbox"/> -Medicare AWV, Male - Initial	Public	<input checked="" type="button" value="☆"/> <input type="button" value="Preview"/>
<input checked="" type="checkbox"/> -Medicare AWV, Male - Subsequent	Public	<input type="button" value="☆"/> <input type="button" value="Preview"/>

☒ CC ☒ HPI ☐ CurrentMedication ☒ MedicalHistory ☒ Allergies ☒ SurgicalHistory ☐ Examination ☐ PhysicalExam

5. Click *Merge Template*.

OR

Click the arrow next to Merge Template, and then click *Copy Template*:



Merging Templates from the Right Chart Panel

Favorites templates can be merged from the right chart panel by clicking on the "Templates" tab.

Overview DRTLM History CDSS Ordersets **Templates**

Curran, Jeff, 48Y, M as of 02/28/2017

My Favorite Templates

<input checked="" type="checkbox"/> -DATA ENTRY	<input type="button" value="Preview"/>
<input checked="" type="checkbox"/> FP/IM: Blood in stool	<input type="button" value="Preview"/>
<input checked="" type="checkbox"/> FP/IM: Chest pain	<input type="button" value="Preview"/>
<input checked="" type="checkbox"/> FP/IM: Constipation	<input type="button" value="Preview"/>
<input checked="" type="checkbox"/> FP/IM: Hypertension	<input type="button" value="Preview"/>
<input checked="" type="checkbox"/> PEDI: 02 Well Child 1 month - EPSDT	<input type="button" value="Preview"/>
<input checked="" type="checkbox"/> PEDI: 15 Well Child 9 to 11 years - EPSDT	<input type="button" value="Preview"/>

1. Choose the Template from the favorite list.
2. The magnifying symbol, allows the user to view the information in the template.

3. Clicking on the arrow will “Merge” the template and insert the information from the selected template into the current progress note.

Note: Note: Using Templates from the Right Chart Panel allows the user to only “Merge” the template.

Adding Favorite Templates

Favorite templates can be added by clicking on the “Templates” button at the bottom of the progress note.

1. From the patient look up window, search for the ‘patient’ labeled as ‘My Favorites’ and go to a progress note.
2. From the progress note click on ‘Templates’ button on the bottom.

Patient Lookup

Search Patient


Fav| x by Name & Search By DOB by DOB Active

	Patient Name	DOB	Phone No	Account No	Last Appt	Prev Name
1	Favorites, My	02/04/2003		11168		

< >

Patient Demographics OK Cancel

Send ▲ Print ▲ Fax ▲ Record Lock ▲ Details ▲ Templates ▲ Claim Letters Ink ▲ Scan

3. Choose the Template Type as Generic & Category as 'All'.
4. Search for 'CCSG' in the 'Find' box to pull up all the CCSG templates.
5. Select the desired template and click  (star symbol). This will add the template to the users favorite list.
6. Once saved, user can exit out of the patient 'My Favorites'.

Below is a list of templates that have been created for Kentucky Department for Public Health:

eCW Template Name	DPH Form Name (if applicable)
Tobacco Counseling Sheet	N/A - Health Promotion Branch requirements
HANDS Referral Record Screen	N/A - Early Childhood Development Branch requirements
Diabetes Self-Mgmt Edu Referral	N/A - Diabetes Prevention and Control Program Requirements
HCV Infection Risk Assessment	HCV 2
Health Equity Questionnaire	E Clinical Works Health Equity Module-ayedits (4)

eCW Template Name	DPH Form Name (if applicable)
CCSG: Adult Initial H&P- Female	H&P 13 Initial (Adult)
CCSG: Adult Initial H&P- Male	H&P 13 Initial (Adult)
CCSG: Adult Interval H&B- Female	H&P 14 Interval (Adult)
CCSG: Adult Interval H&B- Male	H&P 14 Interval (Adult)
CCSG: Domestic Violence Documentation	DV/SA-1 Domestic Violence/Sexual Assault Documentation Form
CCSG: Sexual Assault Documentaion	DV/SA-1 Domestic Violence/Sexual Assault Documentation Form
CCSG: Peds Initial H&P- Female	H&P 13 Initial (Pediatric)
CCSG: Peds Initial H&P- Male	H&P 13 Initial (Pediatric)
CCSG: Peds Interval H&P- Female	H&P 14 Interval (Pediatric)
CCSG: Peds Interval H&P- Male	H&P 14 Interval (Pediatric)
CCSG: Resupply Visit Form	BC-1 Resupply Visit Form
CCSG: Pregnancy Test Visit	PT-1 Pregnancy Test Visit Form
CCSG: Positive Pregnancy Test Only	PT-1 Pregnancy Test Visit Form
CCSG: Negative Pregnancy Test Only	PT-1 Pregnancy Test Visit Form
CCSG: STD 1 Female	STD-1 Sexual History and Physical Exam Form
CCSG: STD 1 Male	STD-1 Sexual History and Physical Exam Form
CCSG: Immunization Only Visit	GR208 & Barren River IMM-1
Dental- Preventive Adult High Risk Abnormal Findings	N/A - Dental Hygiene Program Requirements
Dental- Preventive Adult High Risk Normal Findings	N/A - Dental Hygiene Program Requirements
Dental- Preventive Adult Low Risk Abnormal Findings	N/A - Dental Hygiene Program Requirements
Dental- Preventive Adult Low Risk Normal Findings	N/A - Dental Hygiene Program Requirements
Dental- Preventive Adult Moderate Risk Abnormal Findings	N/A - Dental Hygiene Program Requirements

eCW Template Name	DPH Form Name (if applicable)
Dental- Preventive Adult Moderate Risk Normal Findings	N/A - Dental Hygiene Program Requirements
Dental- Preventive Child High Risk Abnormal Findings	N/A - Dental Hygiene Program Requirements
Dental- Preventive Child High Risk Normal Findings	N/A - Dental Hygiene Program Requirements
Dental- Preventive Child Low Risk Abnormal Findings	N/A - Dental Hygiene Program Requirements
Dental- Preventive Child Low Risk Normal Findings	N/A - Dental Hygiene Program Requirements
Dental- Preventive Child Moderate Risk Abnormal Findings	N/A - Dental Hygiene Program Requirements
Dental- Preventive Child Moderate Risk Normal Findings	N/A - Dental Hygiene Program Requirements
Dental- Preventive Visit	N/A - Dental Hygiene Program Requirements
Dental- Screening Only	N/A - Dental Hygiene Program Requirements
Dental- Varnish Only Visit	N/A - Dental Hygiene Program Requirements
Dental- Varnish Only Visit Codes Abnormal Findings	N/A - Dental Hygiene Program Requirements
Dental- Varnish Only Visit Codes Normal Findings	N/A - Dental Hygiene Program Requirements
Dental-Sealant Only Visit	N/A - Dental Hygiene Program Requirements
EBLL- BLL>25	KCLPPP Case Management Follow Up Report Form
EBLL- Education	KCLPPP Case Management Follow Up Report Form
EBLL- Environmental	KCLPPP Case Management Follow Up Report Form
EBLL- Follow-Up	KCLPPP Case Management Follow Up Report Form

eCW Template Name	DPH Form Name (if applicable)
EBLL- Referrals	KCLPPP Case Management Follow Up Report Form
TB H&P-13	TB H&P-13 TB Clinic Initial Health Assessment/History/Exam
TB-1 Infection Form	TB-1 Infection Form
TB-4 Risk Assessment	TB-4 TB Risk Assessment Form
TB-17 DOT Initial Phase	TB-17a DOT Record Initial
TB-17 DOT Continuation Phase	TB-17b DOT Record Continuation
TB-20 TB Clinic Follow-up	TB-20 TB Clinic Follow-up Visit
Oral Health KIDS Smile	OH-11 KIDS Smile (personal record)
KWCSP - Breast Screening	ACH-58 Cancer Screening Form
KWCSP Cervical Cancer Screening	ACH-58 Cancer Screening Form
Bright Futures Well Child 2-5 days	Bright Futures Infancy Core Tools
Bright Futures Well Child 1 month	Bright Futures Infancy Core Tools
Bright Futures Well Child 2 months	Bright Futures Infancy Core Tools
Bright Futures Well Child 4 months	Bright Futures Infancy Core Tools
Bright Futures Well Child 6 months	Bright Futures Infancy Core Tools
Bright Futures Well Child 9 months	Bright Futures Infancy Core Tools
Bright Futures Well Child 12 months	Bright Futures Early Childhood Core Tools
Bright Futures Well Child 15 months	Bright Futures Early Childhood Core Tools
Bright Futures Well Child 18 months	Bright Futures Early Childhood Core Tools
Bright Futures Well Child 2 years	Bright Futures Early Childhood Core Tools
Bright Futures Well Child 2.5 years	Bright Futures Early Childhood Core Tools
Bright Futures Well Child 3 years	Bright Futures Early Childhood Core Tools
Bright Futures Well Child 4 years	Bright Futures Early Childhood Core Tools
Bright Futures Well Child 5 to 6 years	Bright Futures Middle Childhood Core Tools
Bright Futures Well Child 7 to 8 years	Bright Futures Middle Childhood Core Tools
Bright Futures Well Child 9 to 10 years	Bright Futures Middle Childhood Core Tools

eCW Template Name	DPH Form Name (if applicable)
Bright Futures Well Child 11 to 14 years	Bright Futures Adolescence Core Tools
Bright Futures Well Child 15 to 21 years	Bright Futures Adolescence Core Tools
School Health: Burns	GR207
School Health: Ear, Nose, and Throat	GR202
School Health: Head Check	GR205
School Health: Head Injury	GR206
School Health: Headache	GR204
School Health: Immunization	GR208
School Health: Insect Bite/Sting	GR209
School Health: Negative Pregnancy	GR203
School Health: Psychotropic Med/Assess	GR201
School Health: Asthma/Respiratory Assessment	GR210
School Health: GI Assessment	GR211
School Health: Tracheotomy Care	GR212
School Health: Skin Irritations	GR213
School Health: Wounds	GR214
School Health: Eye Assessment	GR215
School Health: Nose Bleed	GR216
School Health: Screenings	GR217
School Health: Gastrostomy Care/Feeding	GR218
School Health: Catheterization	GR219
School Health: Hypo-Hyperglycemic Assessment	GR222
School Health: Seizure	GR223
School Health: Muscle/Bone/Joint Pain or Injury	GR225

eCW Template Name	DPH Form Name (if applicable)
School Health: Menstrual Cramps	GR227
School Health: Oral Assessment	GR228
School Health: Heat Exposure	GR230
MNT-Adult	MNT-Adult
MNT-Pediatric	MNT-Pediatric
MNT-Diabetes	MNT-Diabetes
MNT-Gestational Diabetes	MNT-Gestational Diabetes
MNT-Renal	MNT-Renal
MNT-Follow-Up	MNT-Follow UP

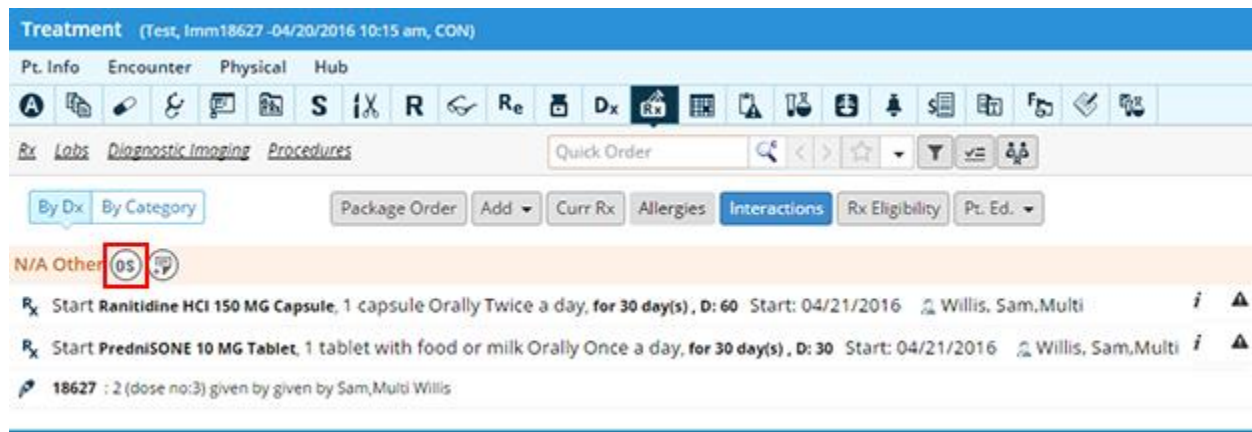
Order Sets

Using Order Sets from the Progress Notes

Path: *Progress Notes > Treatment > OS icon*

OR

Progress Notes > ICW > Order Sets



The following table describes the information in this window:

Area	Description
Order Set drop-down list	Select an Order Set
Select All button	Select the entire Order Set
First check box in the heading	Select an entire section, check the first box in the heading column. After, all items in the section are highlighted, click <i>Order</i> .
Check box next to an item	Select an individual item in a section.

Accessing Order Sets from ICW

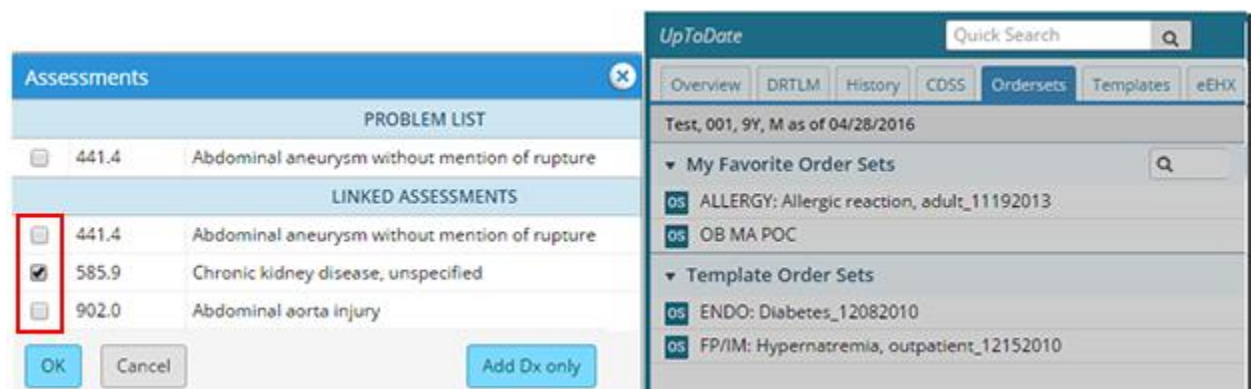
Path: *Progress Notes > ICW > Order Sets*

Access an order from the ICW when it is added to the provider's favorites list, or associated with a Progress Notes template.

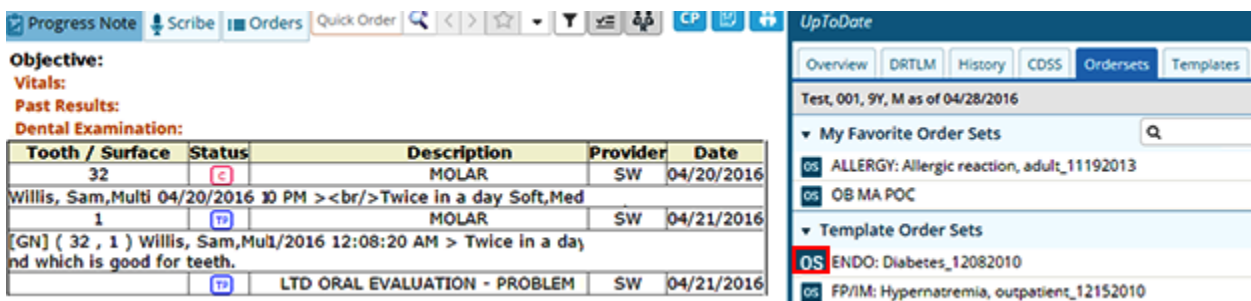
Note: The OS tab must be enabled to use this feature: Menu > File > Settings > My Settings > Show/Hide

To access an Order Set from Interactive Clinical Wizard (ICW):

1. Click the *OS* icon next to the Order Set.
2. The list of trigger diagnosis codes displays in the Linked Assessments window:



3. Check the box next to the diagnosis code.
4. Click *OK*.
5. To merge or copy Order Sets associated with Progress Notes templates, click the *OS* icon next to the template Order Set:



Below is a list of order sets that have been created for Kentucky Department for Public Health.

eCW Order Set Name
CCSG: Well Child Pt Edu – Infancy (0mo-11mo)
CCSG: Well Child Pt Edu – Early Childhood (12mo-4yr)
CCSG: Well Child Pt Edu – Middle Childhood (5yr-10yr)


eCW Order Set Name
CCSG: Well Child Pt Edu – Adolescence (11yr-21yr)
CCSG Domestic Violence Pt Edu
CCSG Family Planning
CCSG General Pt Edu
CCSG HIV Pt Edu
CCSG Immunizations
CCSG Lead Pt Edu
CCSG Oral Health Pt Edu
CCSG Points to Remember Pt Edu
CCSG Prenatal Pt Edu
CCSG Sterilization Pt Edu
CCSG Tobacco Pt Edu
Diabetes Patient Resources
Hepatitis C Virus Teaching Sheets

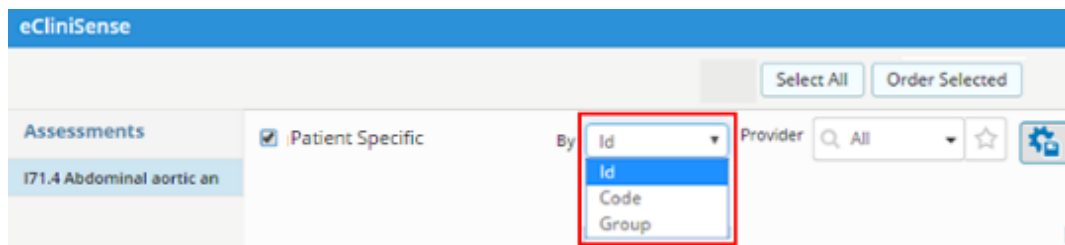
eCliniSense

Path: *Progress Notes > Treatment*

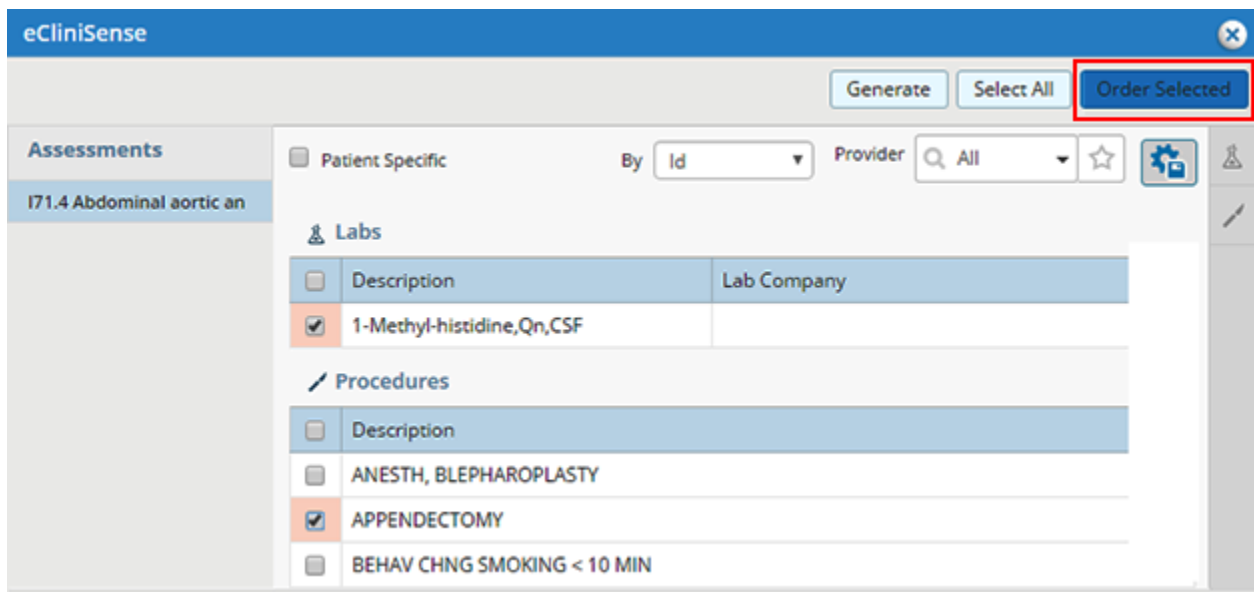
eCliniSense enables providers to review treatment (medications, labs, diagnostic imaging tests, or treatment notes) ordered previously for a particular diagnosis. Providers may choose to use a part, or the entire treatment in the current treatment plan.

To use eCliniSense from the Treatment window:

1. Next to the treatment category, click the eCliniSense icon: 
2. Click the assessment in the left pane.
3. Search the eCliniSense information using the *By* drop-down list:
 - ♦ By *ID* to generate for a specific ICD name.
 - ♦ By *Code* to generate for a particular ICD-10 code (*e.g.*, E11).
 - ♦ By *Group* to generate for entire ICD 10 group (*e.g.*, E11):



4. Generate eCliniSense for that particular patient by checking the *Patient Specific* box.
5. From the *Provider* drop-down list, select the provider.
6. Click *Generate*.
- The list of treatment displays.
7. Select the treatment by checking the boxes next to the description.
8. Click *Order Selected*:



The treatment is added to current Treatment section

Quick Search

Path: *Progress Notes > Quick Search field*

The Quick Search populates from the Previous Assessments ordered and Problem List. There is an arrow at the top and end of the list, click to view the rest of the list. Order labs, DI, procedures, immunizations, injections, and medications, and associate them with patient's assessments.

To use Quick Search:

1. Enter the search text in the Quick Search field:

The Problem List and Previous Assessments display.

2. Check the box next to the assessment and click the order.

The order window opens:

3. Click the name of the order.

The order is added to the Progress Notes.

Patient Dashboard Options

Accessing the Patient's Demographic Information and Patient Hub

The Info button in the Patient Dashboard enables access to detailed patient demographic information and the Hub button enables access to the Patient Hub.

To access Patient Information and Hub:

From the Patient's dashboard, click *INFO* to access the patient's demographic information, or *HUB* to open the Patient Hub:



Printing and Faxing Medical Summary

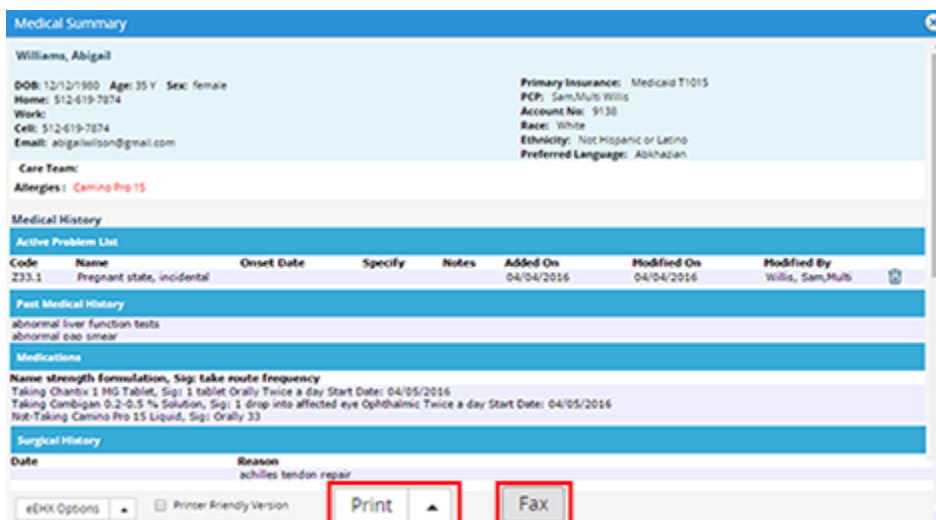
Path: *Progress Notes > Medical Summary link*

OR

Patient Hub > Medical Summary

To print or fax Medical Summary:

- From the Medical Summary window, click the arrow next to *Print*.
- Click Print/Fax Options.
- Select the categories to include in the medical summary by checking the boxes.
- Click *Print* or *Fax*:



Viewing Patient Encounters

Path: *Patient Hub > Encounters icon*

OR

Patient Dashboard > Encounters tab

Printing and Faxing Patient Encounters

Path: *Patient Hub > Encounters*

To print patient encounters:

1. From the Encounters window, select an encounter, click the arrow next to the *Print* button, or *Fax* button.
2. Select categories to print or fax by checking the boxes:

The screenshot shows the 'Encounters (Williams, Abigail)' window. On the left, there is a list of encounters with columns for Date and a checkbox. The date 06/23/2016 is selected. A 'Print' dialog box is open in the center, showing a list of categories to print or fax. The categories are: ALL CATEGORIES, CC, HPI, CurrentMedication, PhysicalExam, Assessment, Therapeutic, TherapyAssessment, and Treatment. The 'Print' button is highlighted with a red box. On the right, there are filters for Encounters, Service Dates, Diagnosis (ICD-9), and Case Type. Below the filters is a table with columns: Resources, Reason, Fac Code, and Facility Name. The table contains several rows of encounter data.

Resources	Reason	Fac Code	Facility Name
Willis,Sam,Multi	a-fib	12345...	Test Facility
Willis,Sam,Multi	a-fib	12345...	Test Facility
Willis,Sam,Multi	a-fib	12345...	Test Facility
Willis,Sam,Multi	a-fib	12345...	Test Facility
Willis,Sam,Multi	a-fib	12345...	Test Facility
	Abdomin...	11	Test2 Facility
		12345...	Test Facility

3. Click *Print* or *Fax*.

Viewing Scanned Documents

Path: *Patient Dashboard > Patient Docs link*

OR

Patient Hub > Patient Docs

To view scanned documents:

1. Click the name of the document from the folders list in the left pane.

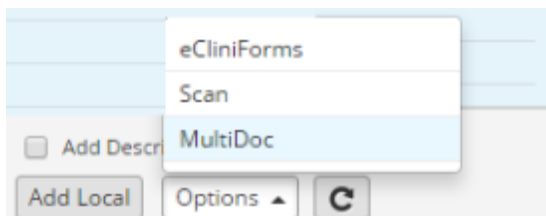
The document displays in the right pane:



Printing and Faxing Scanned Documents

To print or fax multiple scanned documents:

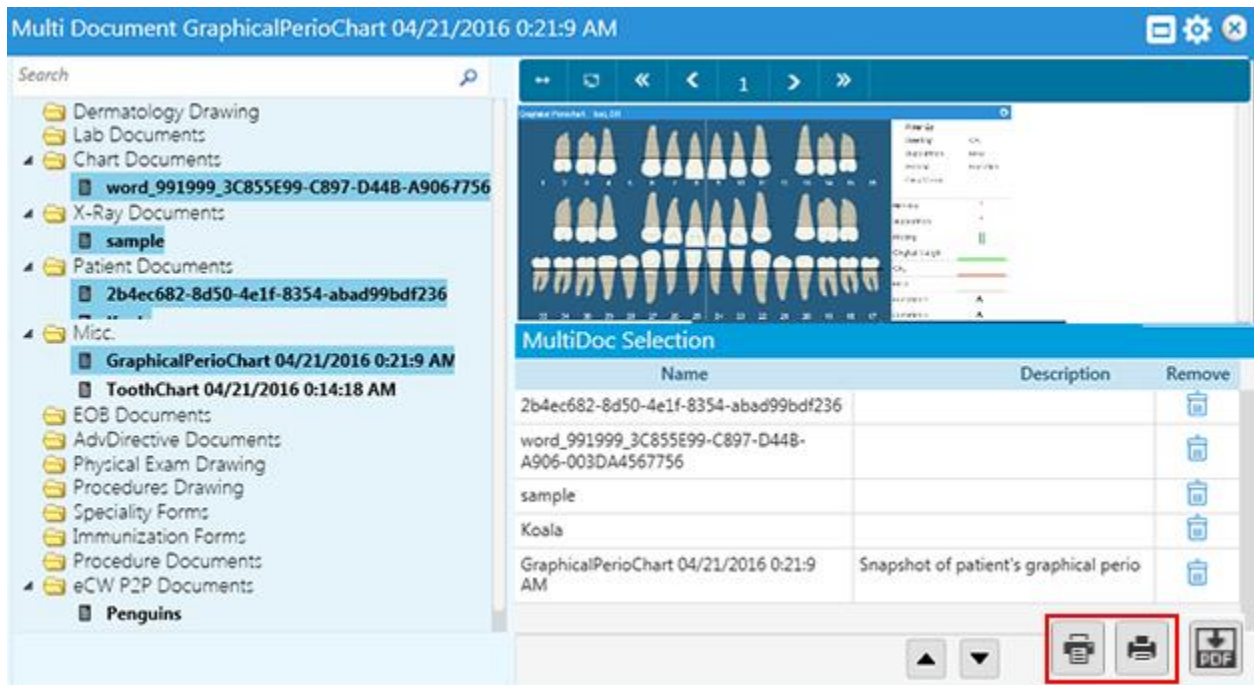
1. From the patient documents window, click *Options*.
2. Click *MultiDoc*:



The Multi Document window opens.

3. Select the needed files from the list.

The preview of the last selected document and the selected files display in the right pane:

4. Click *Fax* or *Print*:

Viewing Patient Flowsheets

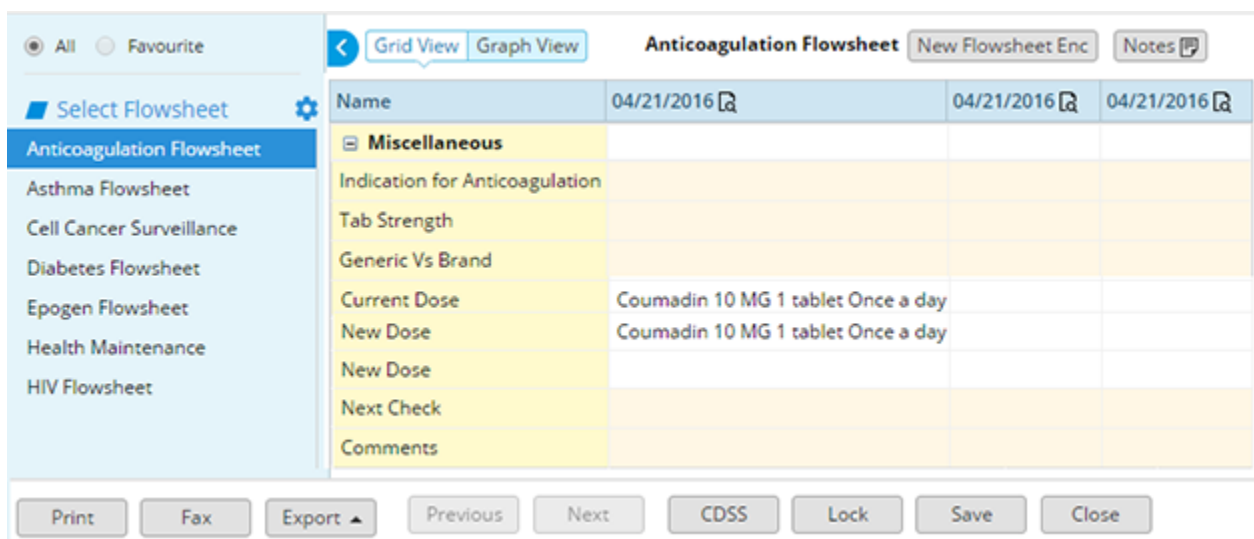
Path: *Patient Dashboard > Flowsheets link*

OR

Patient Hub > Flowsheets

To view Flowsheets:

1. In the Select Flowsheet list, click the name of the Flowsheet.
2. The Flowsheet displays in the right pane:



3. The yellow fields are items populated from the Progress Notes.
4. View Flowsheet in *Grid View* and *Graphical View*.
5. Enter notes in white fields next to the Flowsheet items.
6. Click *Save* to save the flowsheet.
7. Click *Lock* to lock the Flowsheet after editing.
8. Print, fax, or export the Flowsheet as a CSV file.

Printing and Faxing Flowsheets

To print the Flowsheet:

1. From the select Flowsheet window, click *Print*.

The print preview window opens:

Anticoagulation Flowsheet	
Patient: Test, Adams DOB: 01/21/1986 Age: 30Y Sex: male	
Name	04/11/2016
Indication for Anticoagulation	No
Tab Strength	45
Generic Vs Brand	10
PT/INR	
Current Dose	
Current Dose	
Hold for (days)	4 days
New Dose	
New Dose	
Next Check	04/18/2016
Comments	Patient condition improving

2. Adjust the settings as needed.
3. Click the *Print* button to print the Flowsheet.

OR

Fax the Flowsheet to the pharmacy:

- a. From the select Flowsheet window, click *Fax*.
- b. From the Pharmacy Lookup window, select a box by checking the box, and click *OK*.

The Fax Documents Preview window opens.

- c. Review the sender, recipient details, and then click *Send Fax*.

The Flowsheet is sent to the pharmacy.

Interactive Clinical Wizard (ICW) Options

Accessing and Customizing the ICW

Path: *Main Menu > eCW Menu > File tab > My Settings > Show/Hide*

Select the tabs that display in the Interactive Clinical Wizard (ICW). A minimum of two tabs are mandatory in the ICW.

To customize ICW:

1. For each of the options, select the *Show* or *Hide* radio button.
2. In the *Tabs to display in Progress Note Chart Panel* section, check the box next to each tab to display it in the ICW:

On the ICW, the selected tabs and options display:

Overview DRTLM History CDSS Ordersets Templates

Curran, Jeff P, 55Y, M as of 04/06/2016

▼ Medical History

- Detached Retina-right eye
- cataracts. Detached Retina-right eye
- cataracts
- Abdominal pain
- abnormal CT chest
- abnormal liver tests
- abscess

▼ Surgical History

- cataract removal 2007
- cataract-lens implants 2007
- heart catheterization 1990
- adenoidectomy
- amputation, AKA
- amputation, foot partial
- appendectomy 1965

▼ Family History

- Father: deceased, heart attack, high cholesterol
- Daughter(s): alive 24 yrs, healthy
- Spouse: alive 40 yrs, healthy
- Mother: alive 80 yrs, heart attack, high cholesterol, high blood pressure

▼ Social History

- Diet: controlled
- Alcohol Screening: Points: 0, Interpretation: Negative
- Alcohol: yes
- Caffeine: no
- Exercise: yes
- Home smoke detector use: yes
- Marital Status: single
- New since last visit: none
- Occup. exposure: none
- Occupation: unemployed
- Others at home: no

Overview DRTLM History CDSS Ordersets Templates

Curran, Jeff P, 55Y, M as of 04/06/2016

You are the primary care giver for this patient

▼ CDSS Alerts

- BP control in DM (130/80)
- Depression screening
- Pneumococcal vaccine
- Sexual history taken

▼ Practice Created Alerts

- [G]colonoscopy 04/06/2016
- [G]PSA,TOTAL 04/06/2016
- [Dx]diabetes (HEMOGLOBIN A1C) 04/16/2009

▼ Registry Alerts

Overview DRTLM History CDSS Ordersets Templates

Curran, Jeff P, 55Y, M as of 04/06/2016

▼ My Favorite Order Sets

- OS Back pain-adult
- OS Common cold (URI viral)-adult
- OS Fever-adult
- OS Headache
- OS Rheumatoid arthritis-adult
- OS Upper Respiratory Infection
- OS Gastroenteritis-adult
- OS Willis Profile 1
- OS Dermatiis-adult

▼ Template Order Sets

There are no order sets associated with applied template/no qualifying template has been applied to this chart

You can associate order sets to templates from the template create/update section.

Overview DRTLM History CDSS Ordersets Templates

Curran, Jeff P, 55Y, M as of 04/06/2016

▼ My Favorite Templates

- Acute Diarrhea
- Adult GYN
- Adult PE
- Adult URI
- Allergic Rhinitis
- Allergic Rhinoconjunctivitis
- Anal Fissure
- Anxiety/Depression
- Asthma Exacerbation
- Atopic Dermatitis
- Augmentation Mammoplasty Pre-Op
- B-12 Shot
- B-12 Shot (Medicare Patients)
- Birth Control
- Birth Control F/U
- Blank
- Blank Procedure
- Blocked Tear Duct
- BP check
- Bronchiolitis (No Neb Given)
- Cardio: Atrial Fibrillation - Follow Up

CDSS Measures

Path: *Progress Notes > Patient Dashboard > CDSS link*

Monitor all the CDSS alerts set for a patient in the CDSS window.

To access CDSS alerts:

From the CDSS window, select the *All* tab to view all patient alerts, or select the *CDSS* tab to view only CDSS alerts:

The screenshot shows the eClinicalWorks CDSS window for patient Jeff Curran, 55Y, M, DOB 12/13/1960. The window has tabs for All, CDSS, Practice Configured, and Registry. The CDSS tab is selected, showing a table of alerts. The left sidebar displays the patient's medical summary and assessment.

Alert	Last Done	Freq	Due Date	Orders	Status
CDSS Alerts					
BP control in DM (130/80)		12M	04/06/2016		Red icon, Hand icon, H icon
Depression screening		12M	04/06/2016		Red icon, Hand icon, H icon
Pneumococcal vaccine		60M	04/06/2016	Test	Red icon, Hand icon, H icon
Practice Configured Alerts					
colonoscopy		5Y	04/06/2016		Red icon, Hand icon, H icon
Registry					
This patient does not meet the specified criteria for any Registry alerts.					

The CDSS alerts also display in the ICW:

The screenshot shows the UpToDate ICW interface for patient Shah, Krunal L, 25Y, M, as of 04/21/2016. The CDSS tab is selected, displaying a list of alerts.

Alert	Due Date	Status
CDSS Alerts		
Alcohol use screening		Info icon
Audit-C		Info icon
Body Mass Index		Info icon
Depression screening		Info icon
Smoking status		Info icon
Practice Created Alerts		
[G]Td (adult) preservative free	04/21/2016	Info icon, Red icon
[G]Tdap	04/21/2016	Info icon, Red icon
Registry Alerts		

Features of ICW CDSS tab:

- All non-compliant CDSS alerts display in this section (*i.e.*, alerts that did not satisfy the numerator or denominator criteria).
- A plus icon displays next to an alert that is linked to an Order Set. Click the plus icon to view the associated alert.
- To apply the Order Set to the patient's Progress Notes, click the OS icons next to the alert.
- An arrow next to the alert displays indicates an associated quick order set. Click the arrow next to the order set to apply it to the Progress Notes, update a status for the order.

Alerts

Patient Specific Alerts

Path: Progress Note Patient dashboard > CDSS > Practice Configured

A practice can add clinical reminders to any of their patient's profile based on the alerts types.

To create patient specific alert:

1. Click the Patient Specific Alert button.
The Patient Specific Alert window opens.
2. Select the Alert Type radio button.
3. In the Name text box, search for the alert.
4. In the Description box, briefly describe the alert.
5. (Optional) Enter the *Recall After* and *Due Date*:

Patient Specific Alert

Patient: Benjamin, Hans

Alert Type: ☒ Lab ☐ DI ☐ Imm / T. Inj ☐ Procedure ☐ Billing ☐ Other

Name: Bacterial Antigens Recurring: ☐

Description: Infection Alert Recall After: 3 Weeks

Addl Entities: Willis, Sam, Multi Due Date: 05/02/2016

Provider List: Willis, Sam, Multi

6. Click **OK**.

Note: Use the **Error! Reference source not found.** feature to recall Patient Specific, and Generic alerts.

Suppressing Patient and Generic Alerts

Path: *Progress Note Patient dashboard > CDSS > Practice Configured*

To suppress the patient and generic alerts:

1. Click the suppress icon, next to the name of the alert.
2. Specify the duration to suppress.
3. OR

Permanently suppress by checking the Never Remind box:

Practice Configured Alerts

Alert	Last Done	Freq	Due Date	Orders	Status
Pap Smear, 2 Slide		3Y	04/11/2016		
Tdap (adult) preservative free		10Y	04/11/2016		
Tdap		50Y	04/11/2016		

Suppress Alert - Td (adult) preservative free

Suppress Until:

☐ Never Remind

Reason: Willis, Sam, Multi 4/11/2016 09:26:47 AM > Testing

4. Click **Close**.

Global Alerts

Global Alerts are established to alert staff members of important information related to the patient. Global alerts allow staff members to see this information quickly and in several areas within the system.

Global Alerts Configuration

Global Alerts

Appt & Billing

Clinical

Both

Global Alerts for Test,Becki

Type	Name	Notes
------	------	-------

	Name	Description	
	Dental Consent	No Parent Signature on Cons...	
	No Home Contact		
	Custody Issues		
	Need New Address		
	Need New Phone Num...		
	Foster Child		
	Poverty Level		
	VFC Eligible		
	Sensitive Subject		
	Disability		

Prev

Next

New

View Patient Logs

OK

Cancel

These alerts will pop-up on the screen whenever the patient’s appointment is created\modified on the Resource Schedule to alert the front desk staff. The associated colors of the global alert will show up in the patient look up screen and in the right chart panel. The Notes can also be customized with patient specific information associated with each Global alert.

Generating and Printing Letters

Path: *Patient Lookup > Patient Hub*

Letters can be accessed from the Patient Hub.

To generate or print letters from the Patient Hub:

1. From the Patient Hub, click *Letters*:

The screenshot shows the Patient Hub interface for a patient named [REDACTED] (SSY, M). The interface includes a sidebar with navigation icons for Labs, DX, Procedure, Immuniz, Referral, Allergies, Encounters, CBRS, CDSS, Rx, and Notes. The main content area displays patient information, including a profile picture, name, date of birth (12/13/1960), and account number (9118). It also shows billing information (Patient Balance: \$65.00, Collection Balance: \$314.66), appointments (Last Appointment: 04/04/2016 10:00 AM), and a structured data section (Color of Hair: Skin-Bald, Color of Eyes: Blue). On the right, there are circular icons for Labs (6), DX (0), Referrals (1), Actions (0), Tel Enc (1), Web Enc (0), Docs (0), and P2P (0). At the bottom, there is a grid of buttons for Progress Notes, Patient Docs, Action, New Tel Enc, Medical Summary, Devices, Logs, New Web Enc, Medical Record, Consult Notes, Letters (highlighted with a red box), Send Message, Problem List, Flowsheets, Print Labels, Messenger, eClnForms, PHM Hub, and Dental Exam.

2. From the Letter Templates window, select the letter template and click the Run Letter icon.
3. After the letter is generated, print, publish to the Patient Portal, or save the letter using the icons at the bottom of the window.
4. In the Print window, select the printer and click *Print*:

Print

Print Handling

- ☐ None
- ☐ Fit to Page Margins
- ☐ Reduce to Page Margins
- ☒ Custom Scale: 100

Print Range

- ☐ Current Page
- ☒ All Pages
- ☐ Custom Scale
- ☐ Page Range: 1 To 1

Print Set Up

Name: Microsoft XPS Document Writer

Size:

Source:

Print Close

Telephone Encounters

Creating New Telephone Encounters

Path: *Patient Lookup > Patient Hub*

Create a new Telephone Encounter from the Patient Hub.

To create a new Telephone Encounter:

1. From the Patient Hub, click *New Tel Enc*:

Patient Hub

Patient Information: [55Y, M], 12/13/1960, Account No: 9118 | Messenger Enabled: Yes | Web Enabled: Yes

Billing:

- Patient Balance: \$65.00
- Collection Balance:
- Account Balance: \$314.66
- Collection Status:
- Assigned to:

Appointments:

- Last Appointment: 04/04/2016 10:00 AM
- Facility: WMA:Westborough Medi
- Next Appointment:
- Facility:
- Bumped Appt: NONE
- Case Manager Hic:

Structured Data:

- Color of Hair: Skin-Bald
- Color of Eyes: Blue

Summary:

- Labs: 6
- DI: 0
- Referrals: 1
- Actions: 0
- Tel Enc: 1
- Web Enc: 0
- Docs: 0
- P2P: 0

Buttons:

- Progress Notes
- Medical Summary
- Medical Record
- Problem List
- eClnForms
- Patient Docs
- Devices
- Consult Notes
- Flowsheets
- PHM Hub
- Action
- Logs
- Letters
- Print Labels
- New Tel Enc** (highlighted in red)
- New Web Enc
- Send Message
- Messenger
- Dental Exam

- From the Telephone Encounter window, enter the details for the encounter (*Caller, Reason, Message, Assigned To, etc.*):

The screenshot shows the 'Telephone Encounter' form. At the top, there's a patient profile section with a placeholder for a photo and fields for Name, DOB, and Gender. Below this is a navigation bar with tabs: Medical Summary, CDSS, Labs, DI, Procedures, Growth Chart, Imm, T.Inj, Encounters, Patient Docs, Flowsheets, and Notes. The 'Encounters' tab is selected. The form itself has a 'Patient' search bar. Below the search bar, there are several input fields: 'Answered By' (populated with 'Willis, Sam'), 'Date/Time' (04/06/2016 10:32 AM), 'Facility' (Westborough Medica), 'Pharmacy' (Public), 'Assigned To' (Willis, Sam), 'Provider' (Willis, Sam), and 'Status' (Open). There are also checkboxes for 'High Priority' and 'Addressed and Docs Reviewed'. At the bottom, there are buttons for 'Print Script', 'Send Rx', 'Print Report', 'Progress Note', 'Document', 'OK', and 'Cancel'.

The *Answered By* field populates with the user who created the Telephone Encounter, and the date and time are automatically populated.

- Enter the name of the person who placed the call in the *Caller* field.
 - Document the reason for the call in the *Reason* field.
 - If this message requires immediate attention, check the *High Priority* box.
 - Document any additional message in the *Action Taken* field.
 - Select a staff member from the *Assigned To* field to assign the Telephone Encounter to a provider or another staff member.
 - After the issue is addressed, change the Status of the Telephone Encounter from *Open* to *Addressed*.
- Click *OK*.

Telephone Encounters Tab Overview

The Telephone Encounters window contains the following tabs:

- **Messages:** document messages and actions taken:

The screenshot shows the 'Messages' tab selected. The interface includes a 'Messages' section with a large text area for input, a 'Complaints' button, and a 'Time Stamp' button. Below this is an 'Action Taken' section with a text area and a 'Time Stamp' button. At the bottom, there are buttons for 'Print Script', 'Send Rx', 'Print Report', 'Progress Note', 'Document', 'OK', and 'Cancel'.

- **Rx:** refill or prescribe new medications when a patient doesn't have an appointment:

The screenshot shows the 'Rx' tab selected. The interface includes a 'Rx Eligibility' section with a 'Current Rx' button and 'Interaction' and 'Allergies' buttons. Below this is a 'MEDICATIONS' table with columns for 'Action', 'Med Name and Details', 'Stop date', and 'Notes'. At the bottom, there are buttons for 'Print Script', 'Send Rx', 'Print Report', 'Progress Note', 'Document', 'OK', and 'Cancel'.

- **Labs/DI:** order tests for a patient when they are not at the practice:

The screenshot shows the 'Labs/DI' tab selected. The interface includes a 'Labs' dropdown menu with 'Labs' and 'Imaging' options. Below this is a table with columns for 'Name', 'Reason', 'received', 'result', and 'reviewed'. At the bottom, there are buttons for 'Print Script', 'Send Rx', 'Print Report', 'Progress Note', 'Document', 'OK', and 'Cancel'.

- **Notes:** document additional notes:

- **Addendum:** document notes after the Telephone Encounter has been marked as *Addressed*:

- **Log History:** display the access logs for this Telephone Encounter:

User	Date	Action
eclinicalworks,support	03/03/2016 06:41:17 PM i18n3PMte:true	e-Message
eclinicalworks,support	03/03/2016 06:27:47 PM i18n3PMte:true	e-Message
eclinicalworks,support	03/02/2016 08:41:08 PM i18n2PMte:true	e-Message
Willis,Sam,Multi	03/02/2016 03:11:13 AM i18n2AMte:true	e-Message
Willis,Sam,Multi	02/25/2016 02:39:55 AM i18n25AMte:true	e-Message
Willis,Sam,Multi	02/24/2016 02:57:09 PM i18n24PMte:true	e-Message
eclinicalworks,support	02/22/2016 10:13:05 AM i18n22AMte:true	e-Message

- **Virtual Visit:** access virtual Progress Notes:

Patient: [Name], [DOB] **DOB:** 12/13/1960 **Age:** 55 Y **Sex:** Male
Phone: [Phone] **Primary Insurance:** [Insurance]
Address: [Address]
Encounter Date: 04/06/2016
Provider: Sam Willis, MD Test

Answered by: Willis, Sam **Date:** 04/06/2016

Looking Up Assigned Telephone Encounters

Path: *T Quick-Launch button*

Look up assigned Telephone Encounters by clicking the *T Quick-Launch* button. The number in the button indicates the number of Telephone Encounters, Web Encounters, and Actions that are assigned to the current user.

The *T Quick-Launch* button displays red to indicate that a *High-Priority* Telephone Encounter has been assigned to the user.

Active (Open) Telephone Encounters can be found under the Open, All, and All Open (All Dates) tabs:

REF #	DATE	PATIENT NAME	PROVIDER	REASON	PHONE	ASSIGNED TO	FACILITY
21	04/06/2016 12:32 AM	Curran, Jeff P.	SW		561-703-0241	Willis, Sam	Westborough Medical Associates
20	03/31/2016 10:20 AM	Curran, Jeff P.	SW		561-703-0241	Willis, Sam	Westborough Medical Associates
17	02/05/2009 7:24 PM	Samacoughil, Lono	SW	Refills	555-555-5517	Willis, Sam	Westborough Medical Associates
12	02/04/2009 4:29 PM	Johnson, Jack	SW	Message	555-555-5568	Willis, Sam	Westborough Medical Associates
10	02/02/2009 12:44 PM	Curran, Jeff P.	SW	Refills	561-703-0241	Willis, Sam	Westborough Medical Associates
6	01/13/2009 1:51 PM	McTigue, Patrick	SW	Refills	561-795-1234	Willis, Sam	Westborough Medical Associates

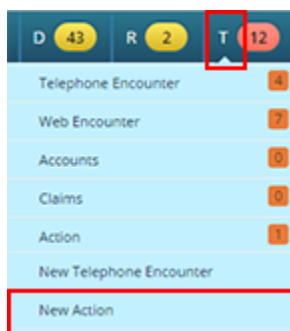
After the Telephone Encounter has been marked as *Addressed*, it displays in the *Addressed* tab.

Actions Overview

The Action feature enables users to create and assign tasks to themselves or other staff members in the system. Actions can be created by clicking *Action* from the Patient Hub, or by clicking *New Action* from the *T* Quick-Launch link.

Actions can be assigned to staff members with messages or certain attachments (*i.e.*, encounters, labs, documents, DI, Specialty Forms, and procedures). The status of the Action can be used to track the progress (*Not Started*, *In Progress*, *Completed*, *Overdue*, and *Canceled*). An Action can be configured to recur repeatedly over a specified period of time.

The number of actions assigned to a user display in the *T* Quick-Launch Link:



Creating a New Action

Path: *Patient Lookup icon > Patient Hub > Action button*

OR

T Quick-Launch link > New Action

To create a new action:

1. From the Action window, select the *Action Type* from the custom-built list.
2. Select the *Attachments* tab to include an attachment from Patient Documents with the Action.

3. Select the *Status* and *Priority* for this action:

The screenshot shows the 'Actions' window with the 'Attachments' tab selected. The 'Action Type' is set to 'Patient Inquiry'. The 'Status' is set to 'In Progress' and the 'Priority' is set to 'High'. The 'Recurrent Action' section shows 'Last Due' and 'Last Done' dates as 03/31/2016 at 10:42:00. The 'Recurrent Pattern' section shows 'Frequency' as 'Hour(s)'. The 'Range of Recurrence' section shows 'No End Date'.

Working with Assigned Actions

Path: *T Quick-Launch link > Action*

Open and address assigned Actions from the T Quick-Launch link.

To open assigned Actions:

1. From the Review Actions window, click the patient name link for the action to open it:

The screenshot shows the 'Review Actions' window with the 'Patient Name' link for 'Test, Test' highlighted. The 'Action Type' is set to 'Patient Inquiry'. The 'Status' is set to 'In Progress' and the 'Priority' is set to 'High'. The 'Recurrent Action' section shows 'Last Due' and 'Last Done' dates as 03/31/2016 at 10:42:00. The 'Recurrent Pattern' section shows 'Frequency' as 'Hour(s)'. The 'Range of Recurrence' section shows 'No End Date'.

2. In the Actions window, review the information.
3. Document actions taken in the *Notes* field.

4. Assign the action to another user.

OR

Mark the Action as *Completed*:

Actions

Action | Attachments | Structured Data

Name* Test,Test Info Hub

Action Type Patient Inquiry

Subject* General

Created By Willis, Sam

Creation Date 03/31/2016 10:56:37

Assigned To* Smith, John

Facility California Medical Group

Start Date 03/31/2016

Due Date* 03/31/2016

Status* Completed

Priority* High

Notes
spoke to the patient over the phone, all inquiries addressed.
Willis, Sam 03/31/2016 11:07:35 AM

Recurrent Action
☐ Recurrent Action ☐ Use existing attachments for recurrent action

Last Due* 03/31/2016 00:00:00

Last Done* 03/31/2016 00:00:00

Recurrent Pattern
Frequency* 0
Hour(s) Day(s) Week(s)
Month(s) Year(s)

Range of Recurrence
☒ No End Date
☐ End After 0 Occurrences
☐ End by 03/31/2016

1D 2D 3D 1W
2W 3W 4W 5W
2M 3M 4M 6M

Merge Template OK Cancel

Documents

Scanning Documents & Working with Scanned Documents

eClinicalWorks comes with a document management feature which allows:

- Staff to scan patient documents into the system and attach the documents to the electronic chart (consent forms, lab results, consult reports, etc.).
- External entities to fax documents directly into the EMR system. The document will be faxed electronically into the system and the staff will be able to attach the document to the patient's electronic chart.

Path: *Main Menu > Documents icon > Patient Documents*

OR

Patient Lookup icon > Patient Hub > Patient Docs button

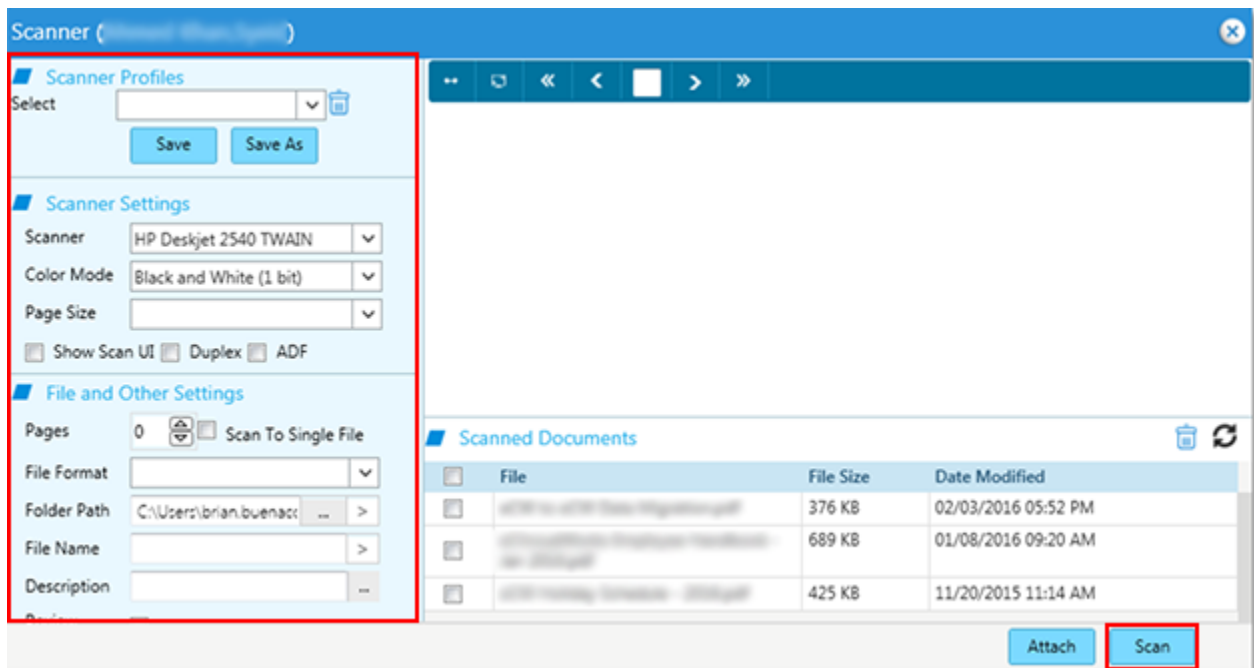
To scan a document and save it in Patient Documents:

1. In the Patient Documents window, search for and select the patient:



2. From the *Options* drop-down list, click *Scan*.

- From the Scanner window, configure the scanner settings.
- Feed the document into the scanner and click *Scan*:



The documents generate in the scan bucket. Scanned documents are temporarily stored in the Scanned Documents section of this window.

The following scanning options are available:

Option	Description
Scan Duplex	Enables users to scan both sides of the document.
Scan to Single File	Enables users to scan multiple documents (pages) into one electronic file.
Color Mode	Enables users to scan documents in black and white, grey scale, or color.
File Format	Enables users to scan documents in .tiff, .pdf, .jpg, or .png files.
Pages	Enables users to define the number of documents to be scanned.
DPI	Enables users to define the quality of the documents.
Show Scan UI	Enables users to display the scanner's user interface to configure additional settings.
ADF	Enables users to enable or disable the Automatic Document Feeder functionality.

Attaching a Scanned Document to the Patient's Chart

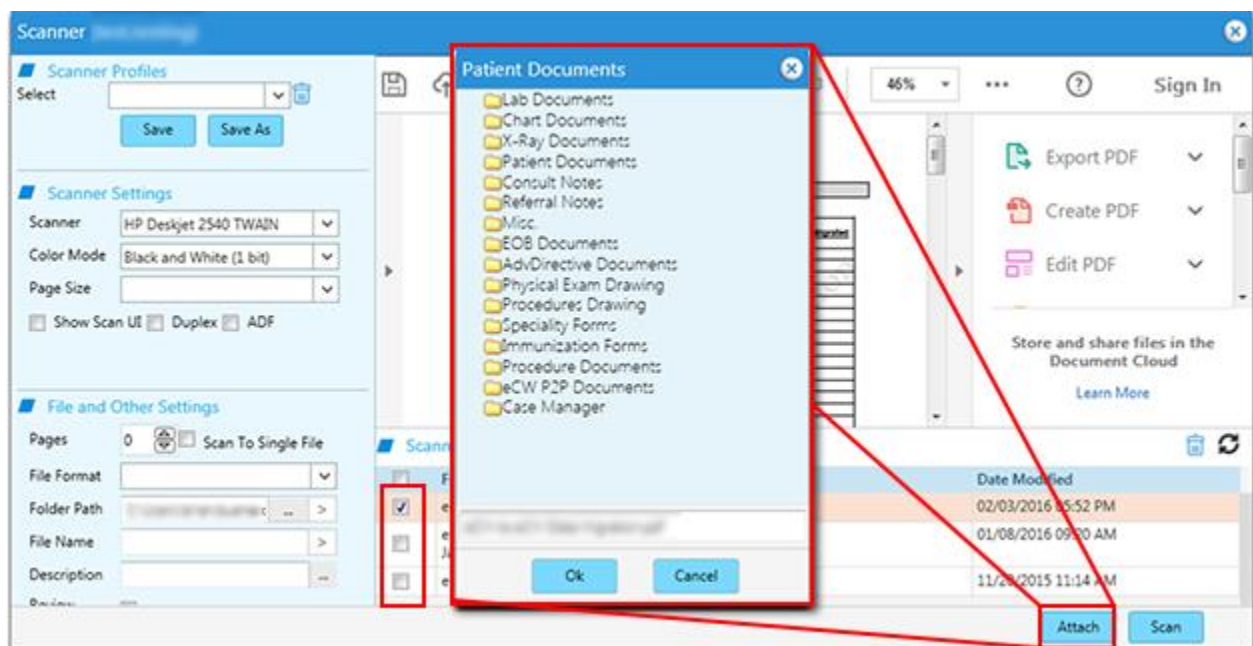
Path: *Main Menu > Documents icon > Patient Documents*

OR

Patient Lookup icon > Patient Hub > Patient Docs button

To attach a scanned document to the patient chart:

1. In the Patient Documents window, search for and select the patient.
2. From the *Options* drop-down list, click *Scan*.
3. From the Scanner window, scan the document.
4. In the Scanned Documents section, ensure that the file name has been documented for the scanned document.
5. Check the box next to the document, and click *Attach*.
6. In the Patient Documents window, select the folder to move this document and click *OK*:



7. From the Document Details window, enter a *Name* and *Description* for the document.
8. (Optional) *Attach* the document to a lab or DI order.
9. (Optional) Add a document *Tag*.
10. (Optional) Select one of the review options:
 - ♦ **Reviewed** – check if a sign-off is not required.
 - ♦ **Reviewed Doc and Lab** – check if a sign-off is not required and the lab has been reviewed.

- ♦ **High Priority** – check if the document is high-priority; when this document is assigned to another user, their D Quick-Launch button will display red.

11.(Optional) Assign the document to another user.

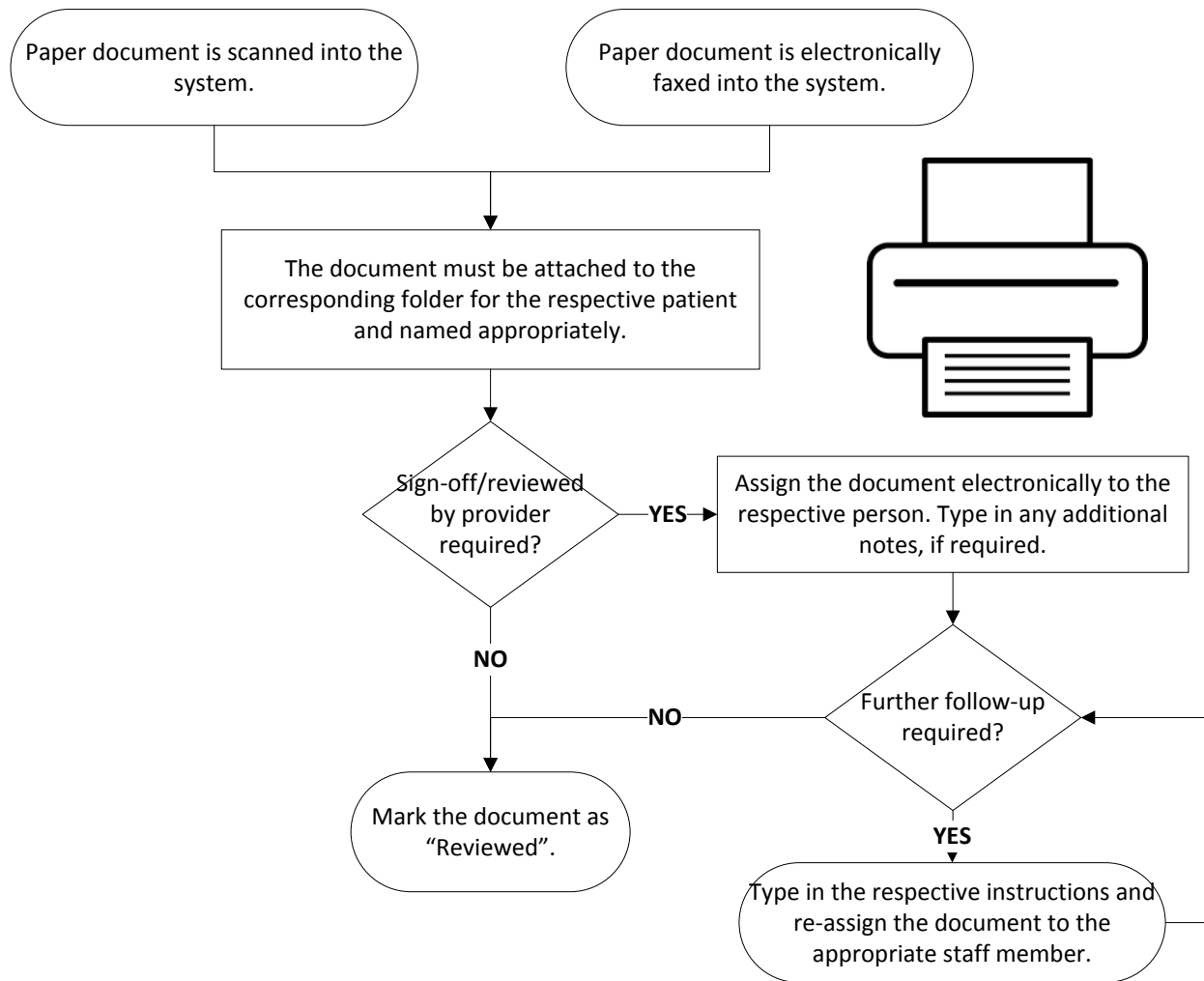
12.Click *OK*:

The screenshot shows the 'Document Details' window with the following fields and values:

- Name:** BackRightEar.Tif
- Description:** (Empty)
- Tag:** (Empty)
- Scanned:** Willis,Sam,Multi
- Date:** 03/09/2016
- Expiry:** (Empty)
- Service:** (Empty)
- Attached:** 01/25/2016
- Assigned:** Willis,Sam,Multi
- Facility:** (Empty)

The 'Assigned' field and the 'OK' button are highlighted with red boxes. The 'OK' button is located at the bottom right of the window.

The below workflow illustrates the management of documents that are scanned into the system and that are faxed into the system.



Receiving Lab and DI Results

Path: *Documents > Review Documents*

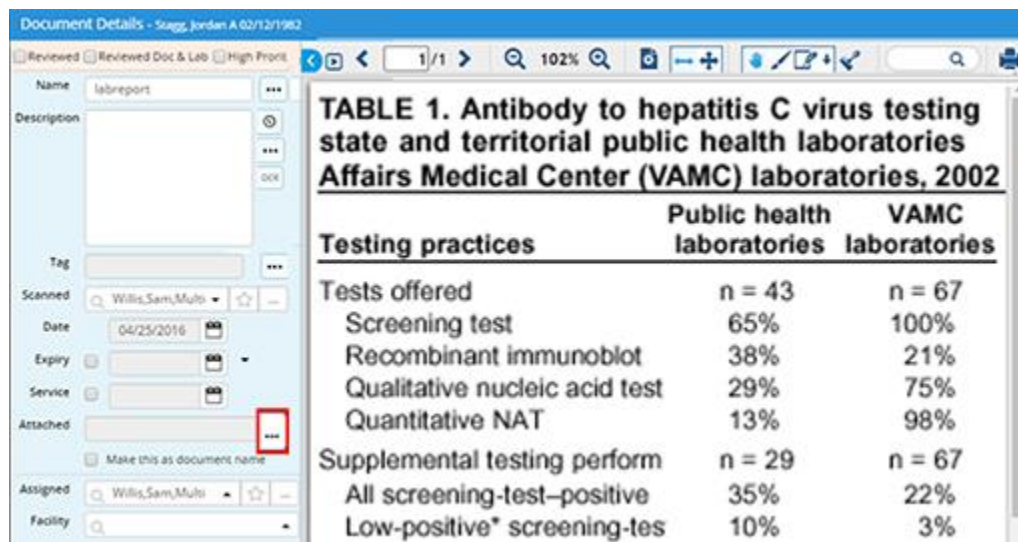
Results of labs and diagnostic imaging may be received in print or by fax. Printed reports have to be scanned to our system. Faxed reports are stored in the Fax Inbox. Transfer the reports to the appropriate folders of the Patient Documents and link it to the corresponding lab or diagnostic imaging order.

To link lab reports to patient documents:

1. From the Review Documents window, click the name of the patient.

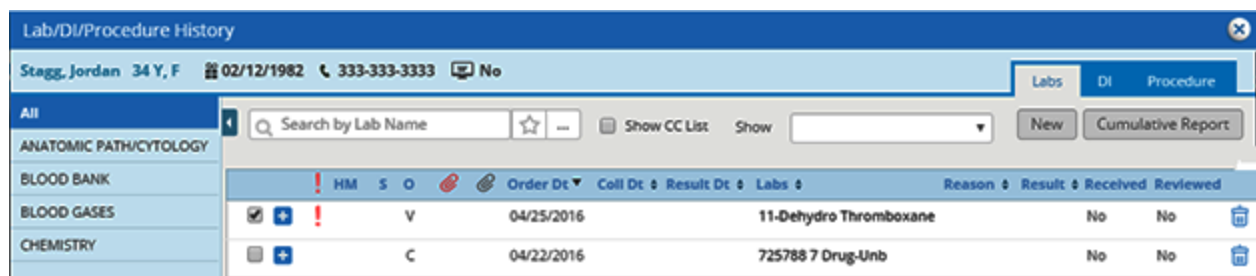
The Document Details window opens.

2. Click the Attached *More (...)* button.:



The Lab/DI/Procedure History window opens.

3. Check the box next to the report:



4. To enter the results, click the name of the lab.

The Lab Results window opens.

5. Click *Results*.

6. From the *Results* drop-down list, select the description for the result:

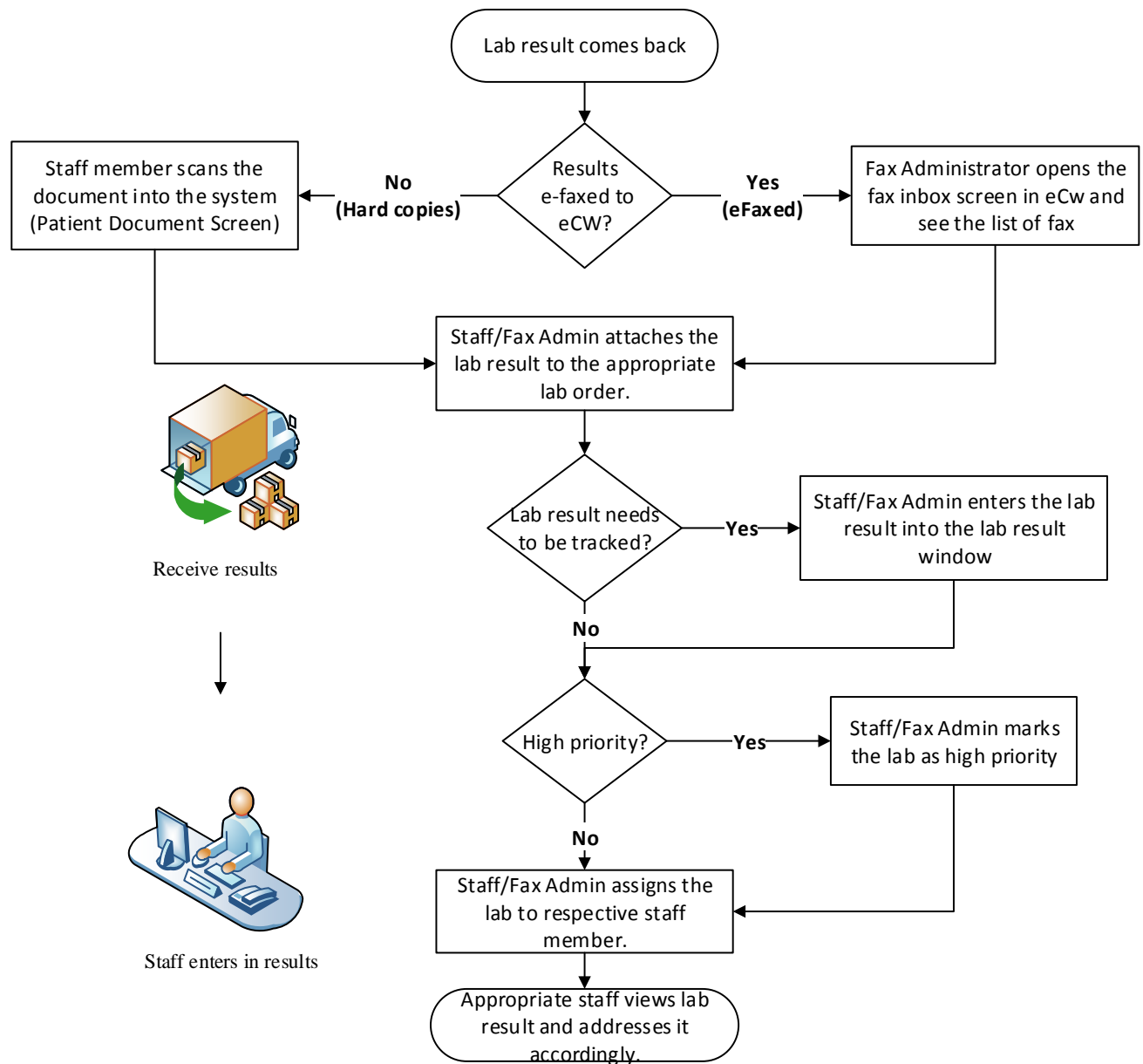
The screenshot shows the EMR III interface for patient Jordan, Stagg, 34 Y F. The lab test is 11-Dehydro Thromboxane B2/Crt. The 'Results' dropdown menu is open, showing the following options: Abnormal, Critical high, Critical low, High, Low (highlighted), Negative, Normal, Positive, Rheumatoid Arthritis, and Stable. The 'High Priority' checkbox is checked, and the 'Status' is 'Open'.

7. (*Optional*) To display with an exclamation mark for urgent attention, check the High Priority box.
8. Time stamp after entering any description notes.
9. Click the Assigned To *More (...)* button.
10. Select the name of the provider.

The provider can access the report in the *D* Quick-Launch button.

11. After reviewing the report, check the *Reviewed Doc & Lab* box.

The below workflow illustrates when the practice receives results from labs and diagnostic imaging.



Receiving Electronic Lab Results

Path: *L Quick-Launch button > To be reviewed tab*

A practice after going live with the lab interface, can receive reports from a lab company or another hospital electronically to eClinicalWorks. Providers receive the electronic lab results to their *L* quick launch button.

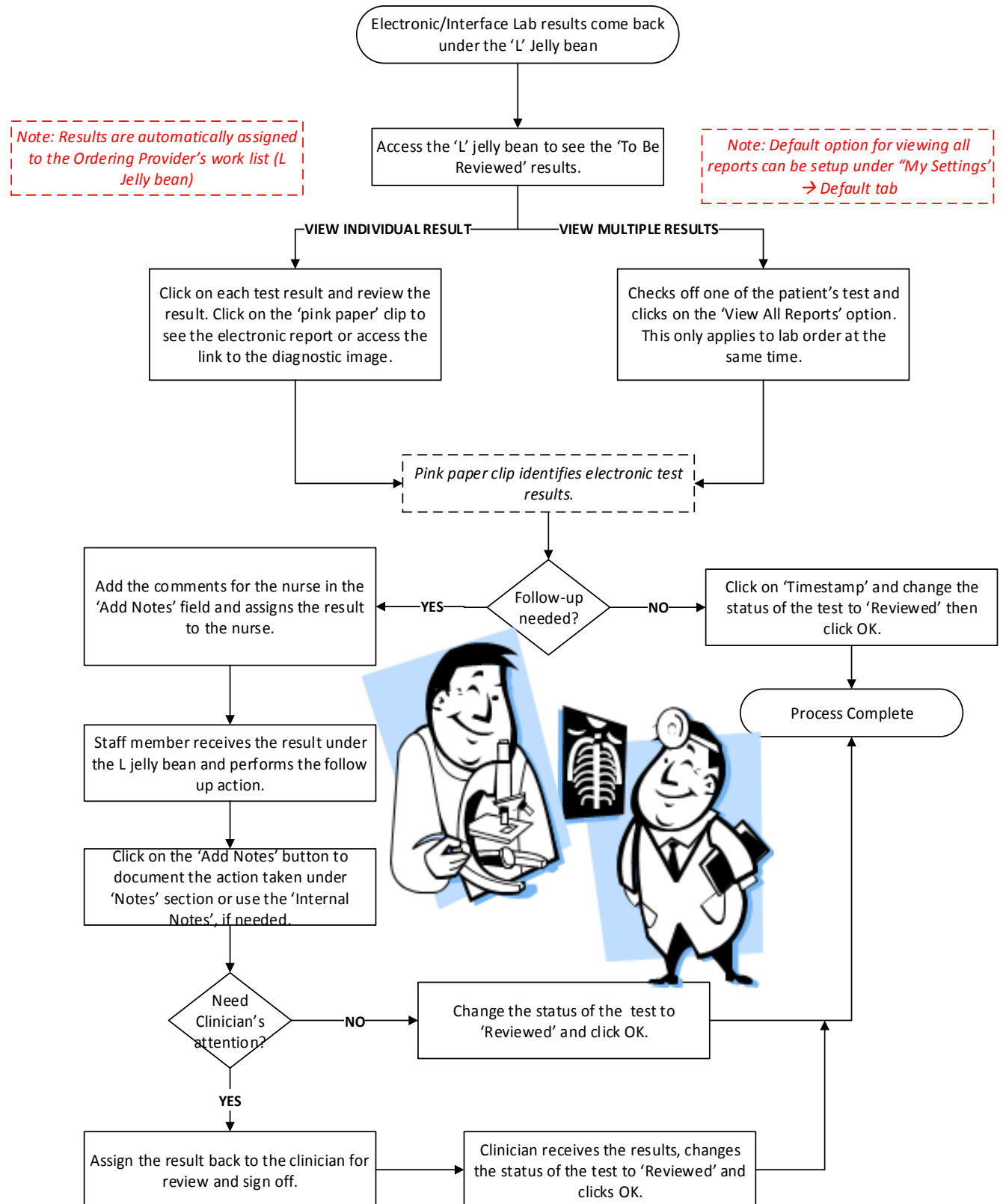
To review and update lab results:

1. Search for and click the name of a patient:

2. To view the lab attributes, click *Results*.
3. To open actual report (received from the lab company, or hospital), click the pink paper clip.
4. In the *Notes* section, add any additional comments:

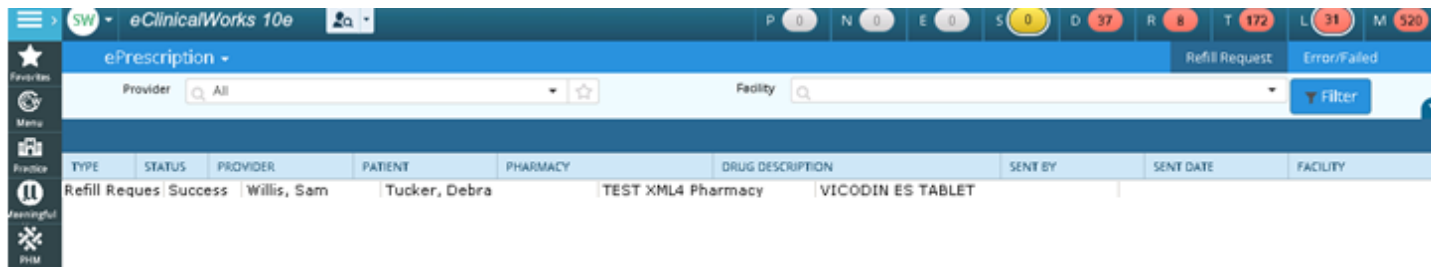
5. On completing the review, check the *Reviewed* radio button.

The below workflow illustrates the lab/DI process with a bi-directional interface.



Receiving Electronic Rx Refill Requests

In addition to sending the Rx refill request via fax and telephone messages, Pharmacies can send the electronic refill request directly into eClinicalWorks. Once received, the 'E' jellybean of the provider will increase. The provider can respond to the eRequest by:



1. Click on the 'E' Jellybean.
2. Select the refill request (double click).
3. From the ePrescribe Rx Window, select the action you would like to take:
 - a. Select 'Approved' to approve the refill request.
 - b. Select 'Denied' to deny the refill request.
 - c. Select 'Approved with Changes' to indicate that the request is approved with specified changes.
 - d. Select 'Denied New Rx to Follow' to indicate that the request is denied and that a new drug will be prescribed.
 - e. Select 'Approved with Changes' if making changes to refill prescription before approving it.

Refill Request from Pharmacy

	Prescribed	Dispensed
Drug Name:	Xanax 1 MG Tablet	Xanax 1 MG Tablet
Formulation:		
Strength:		
Days Supply:		30
Refills:	4	4
Quantity:	30	30
Substitute Allowed:	yes	yes
Last Fill Date:		2016-02-20
Directions:	TAKE 1 TABLET ORALLY EVERY DAY * TAKE 1 TABLET ORALLY EVERY DAY *	

Response

Refill:

Notes for Pharmacy:

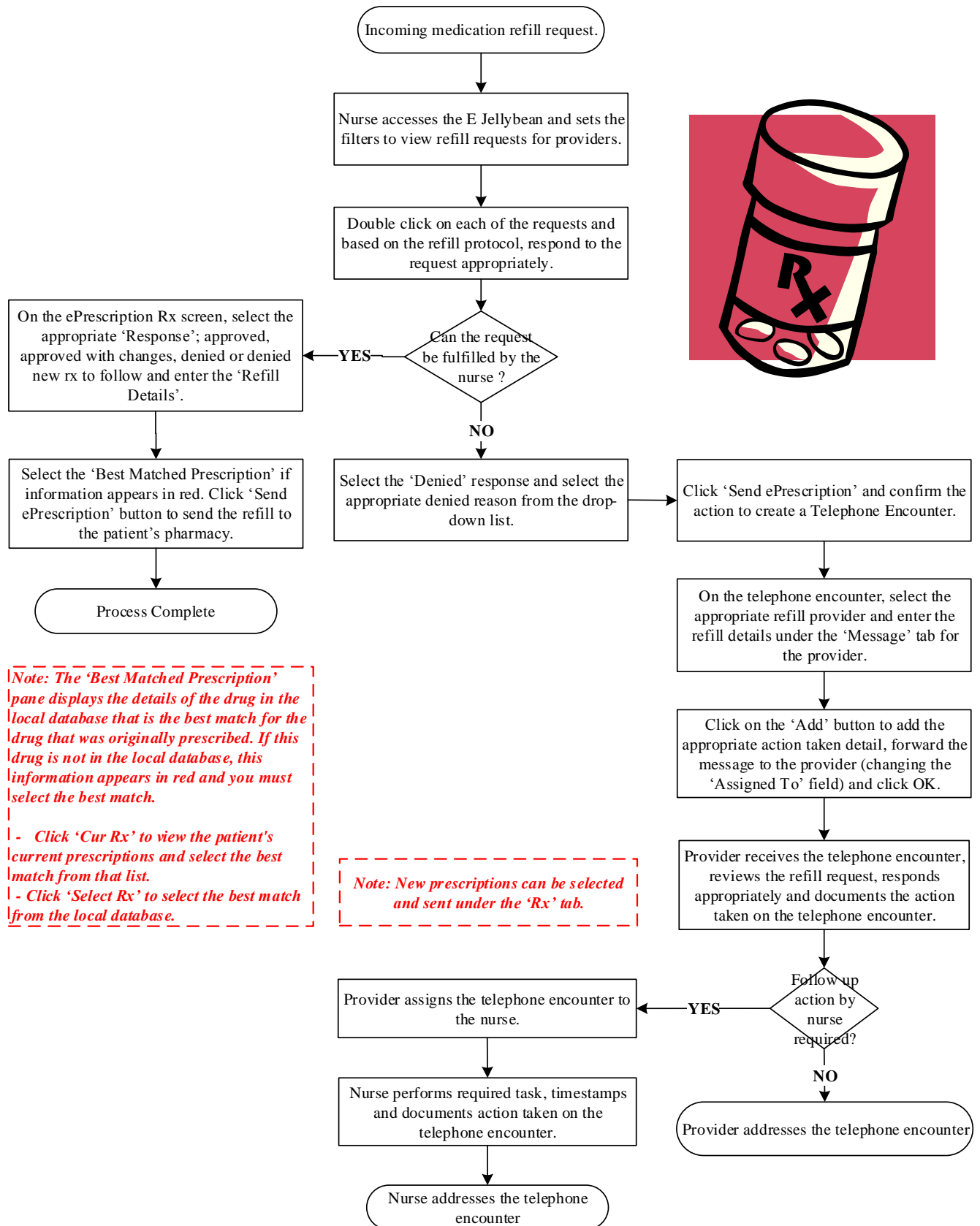
Best Matched Prescription

Drug Name: Xanax
Formulation: Tablets
Strength: 1 MG
Days Supply: 30
Refills: 30
Quantity: 30
Substitute Allowed: yes
Last Fill Date: 2016-02-20
Directions: TAKE 1 TABLET ORALLY EVERY DAY * THANK YOU *

Right Sidebar: Overview, DETAIL, History, COGS. Patient: James, Monte, 64Y, Female 08/01/1952. Global Alerts, Advance Directive, Problem List, Medication Summary (Group By: Medication), Allergies (12 Hour Cold, 12 Hour Nasal Relief Spray, 1st Choice Laxative Ultra Thin), Immunizations, Therapeutic Injections, Circle Of Care.

4. If you approved or denied the refill request, provide details for the refill in the 'Refill Details' pane:
 - ◆ Click the number buttons to specify the number of refills allowed or enter the number in the field.
 - ◆ Click the 'C' button to clear the field.
 - ◆ Enter notes in free text to accompany the response in the Notes field.
 - ◆ Enter notes to accompany the denial in the Notes field.
5. The 'Best Matched Prescription' pane displays the details of the drug in the local database that is the best match for the drug that was originally prescribed. If this drug is not in the local database, this information appears in red and select the best match:
 - ◆ Click 'Select Rx' to search for and select the best match from the local database.
 - ◆ Click 'Cur Rx' to view the patient's current prescriptions and select the best match from that list.
6. Click 'Send ePrescription' to send the refill.

Managing Electronic Refill (E Quick-Launch Button)



Electronic Faxing

Incoming Faxes

Path: *Main Menu > Documents icon > Fax Inbox*

OR

D Quick-Launch link > Fax Inbox

eClinicalWorks comes with document management feature which allows external entities to fax the document directly into eClinicalWorks. The document then can be attached to the patient's electronic chart.

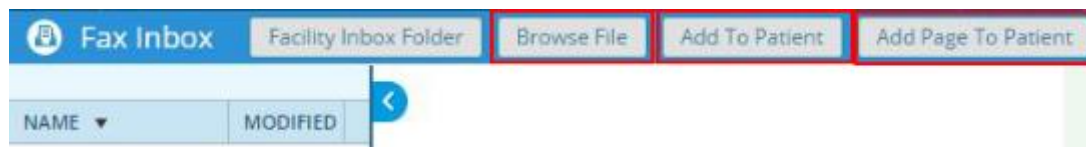
Prior to receiving the faxed document, the practice administrator maps the eClinicalWorks application to the fax inbox for each facility by typing the fax inbox folder's location on the *Fax Server* window. The *Fax Server* window is accessed from the *Fax Server* tab in the *eCW Menu*.

To attach received faxes to the respective patients:

1. Click the *Browse File* button to add a faxed document.
2. In the Browse window select the document, and click *Open*.
3. In the Fax Inbox, select the document and click the *Add To Patient* button.

OR

To add the individual pages from the received fax, click the *Add Pages To Patient* button:



Assigning a Faxed Document to a Staff Member

Path: *Main Menu > Documents icon > Fax Inbox*

To assign a fax document to someone within the practice:

1. Select the document.
2. Right-click the document and click the *Send To* option.
3. Select the appropriate provider or staff member.
4. Click *OK*.

Note: Checking the *Delete document from inbox* box deletes the document from the Fax Inbox, not the patient record.

The provider or staff member will receive the document in the D Quick-Launch button.

Creating Telephone Encounters from Faxed Documents

Path: *Main Menu > Documents icon > Fax Inbox*

OR

D Quick-Launch link > Fax Inbox

If a refill request is faxed to the practice, create a Telephone Encounter to communicate this request to the provider.

To create a Telephone Encounter from a faxed document:

1. From the Fax Inbox window, click the arrow icon next to the document, and click *Create Telephone Encounter* from the drop-down list:
2. From the Telephone Encounter window, search for and select the patient:

The screenshot shows the 'Telephone Encounter' form. At the top, there is a 'Patient' search field with a magnifying glass icon and a 'Name' dropdown menu, which is highlighted with a red rectangular box. Below this, the form is divided into several sections. On the left, there are fields for 'Answered By' (filled with 'Willis, Sam'), 'Caller', and 'Reason' (a dropdown menu). Below these is a 'High Priority' checkbox. In the center, there are fields for 'Date/Time' (filled with '03/22/2016 03:19 PM'), 'Assigned To' (filled with 'Willis, Sam' and a star icon), and 'Provider' (filled with 'Willis, Sam' and a star icon). On the right, there are fields for 'Facility' (filled with 'Valiant Clinic' and a star icon), 'Pharmacy' (a dropdown menu), and 'Status' (radio buttons for 'Open', 'Addressed', and 'Addressed and Docs Reviewed'). At the bottom of the form, there is a tabbed interface with 'Messages' selected, and other tabs for 'Rx', 'Labs/DI', 'Notes', 'Addendum', 'Log History', and 'Virtual Visit'.

3. Complete the message in the *Messages* tab.
4. Assign the Telephone Encounter to the applicable provider or staff member.
5. (*Optional*) Check the *High Priority* box to indicate that this encounter requires immediate attention.
6. Click *OK*:

Telephone Encounter

INFO: W: 03/03/0016 - 196.21...
App: 03/03/0016 (SW)
Lang: Arabic
Trans: No

Medical Summary | CDSS | Labs | DI | Procedures | Growth Chart | Imm | T.Inj | Encounters | Patient Docs | Flowsheets | Notes

Patient: [Search] Name: [Dropdown]

Answered By: Willis, Sam | Date/Time: 10/03/2016 01:50 PM | Facility: [Search]

Caller: [Search] | Assigned To: Willis, Sam | Pharmacy: [Search]

Reason: [Dropdown] | Provider: Willis, Sam | Status: Open | Addressed

☒ High Priority | Messages | Rx | Labs/DI | Notes | Addendum | Log History | Virtual Visit

Messages: [Text Area] | Action Taken: [Buttons: Messenger, Reply to Patient, Time Stamp, Action Taken]

Print Script | Send Rx | Print Report | Progress Note | Document | OK | Cancel

Outgoing Faxes

Path: Main Menu > Documents icon > Fax Outbox

eClinicalWorks allows users to electronically fax documents from the application. User can use the fax feature by clicking on the *Fax* button from various section of the application (Ex. Progress Notes, Patient Documents, Lab/DI Order, *etc.*). Once the document(s) is faxed out, the user can monitor the status of the (sent out) faxes through *Fax Outbox* window.

Fax Outbox | 05/06/2016

Category: All | Current Log: All | Appt Provider: All | Facilities: All | Sent By: All

Refresh | Cancel | Fax Server | Update | View | Send

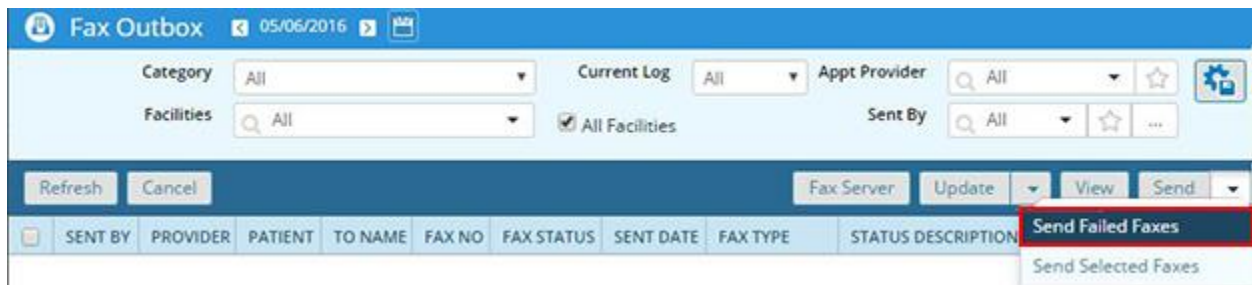
SENT BY	PROVIDER	PATIENT	TO NAME	FAX NO	FAX STATUS	SENT DATE	FAX TYPE	STATUS DESCRIPTION
---------	----------	---------	---------	--------	------------	-----------	----------	--------------------

Resending Failed Faxes from the Fax Outbox

Path: *Main Menu > Documents icon > Fax Outbox*

To resend failed faxes:

In the Fax Outbox, from the *Send* drop-down list, select the *Send Failed Faxes* option:



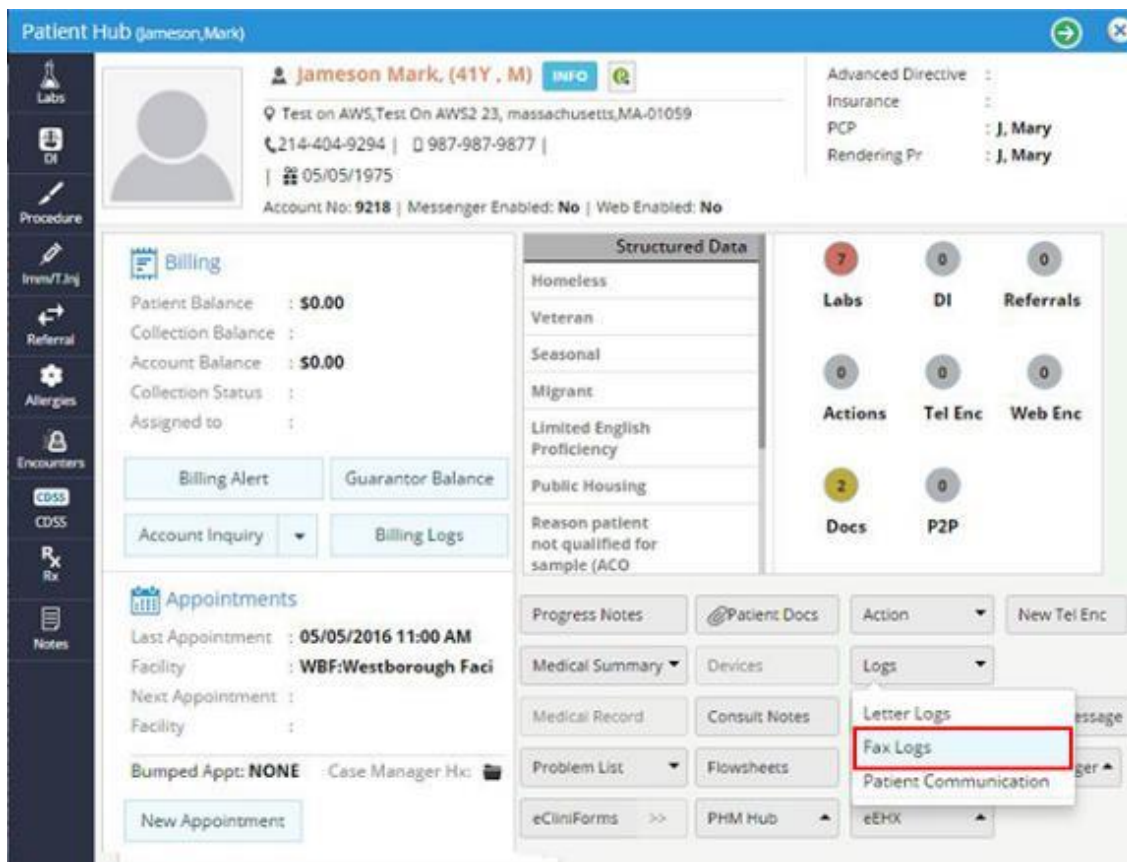
The fax server logs the request and begins transmitting the failed faxes.

Viewing Fax Logs in the Patient Hub

eClinicalWorks keeps a log of all faxes sent per patient.

To view fax logs in the patient Hub:

In the Patient Hub, from the Logs drop-down list, select the *Fax Logs* option:



APPENDIX A: NOTICES

Trademarks

eClinicalWorks®

eClinicalWorks® is a registered trademark of eClinicalWorks®, LLC.

All other trademarks or service marks contained herein are the property of their respective owners.

Current Procedural Terminology® (CPT®*)

CPT® is a registered trademark of the American Medical Association.

Copyright

CPT® Copyright Notice

CPT® copyright 2016 American Medical Association. All rights reserved.

Fee schedules, relative value units, conversion factors and/or related components are not assigned by the AMA, are not part of CPT®, and the AMA is not recommending their use. The AMA does not directly or indirectly practice medicine or dispense medical services. The AMA assumes no liability for data contained or not contained herein

*CPT copyright 2016 American Medical Association. All rights reserved.